BR SHOWCASE

powered by intelligent.partnership

May 2018

Intelligent Partnership is the UK's leading provider of education and insights on alternative investments.

We deliver accredited research, training and events to a community of financial services and investment professionals. IFAs and Wealth Managers make up the majority of our 5000+ subscribers, all of whom are interested or active in alternative investments.

Our aim is to increase awareness and engagement amongst intermediaries, providing them with the tools and information they need to speak knowledgeably with their clients about the whole investment universe.

Our educational content is delivered using digital and printed reports, via video and through live events - these are accredited for Continuing Professional Development (CPD) by the Chartered Insurance Institute (CII), Chartered Institute of Securities and Investment (CISI) and Personal Finance Society (PFS).

We also keep over 12,000 subscribers up to date with the latest news and developments in alternative investments via our Briefing and Spotlight email services, and we run showcase events where investment providers can present to, and meet with, intermediaries.

We are building a future where alternative investments are as understandable and accessible as mainstream assets; if we can do that we will create a much more open and efficient market for everyone.

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BLACKFINCH INVESTMENTS

Deepbridge

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WHY ARE YOU HERE?

The last year has seen a raft of consultations and implementations designed to review and adjust various taxes and tax reliefs and IHT has not been immune; April last year saw the introduction of the Residence Nil Rate band in a fanfare of publicity that told us it will give couples an extra £1 million in IHT relief. And yet, the record IHT take of almost £5 billion in 2016/17 is forecast to continue to grow while the last several years have shown an upward trend in the number of estates liable to IHT.

The Patient Capital Review (PCR) took a good look at EIS, VCT, Business Relief and Agricultural Property Relief, asking if the tax breaks they provide are really doing their jobs. Despite the PCR resulting in significant changes to EIS and VCT, BR was left entirely unscathed. Perhaps because, unlike EIS and VCT, their primary role is not to encourage investment into SMEs. Instead, HMRC's recent research found that, "For the most part, BR enabled testators to achieve their most important objectives of keeping assets in the family and avoiding breaking them up, as well as providing a tax-effective way of passing on their assets to beneficiaries." This looks like a pretty big stamp of Government approval to me and a massive message of support to the 12 million people employed by family businesses and the £4 billion invested via BR products.

It doesn't end there, though, as, in January, the Chancellor requested that the Office for Tax Simplification look at IHT from a technical and administrative viewpoint.

So, we think you're here to take advantage of the very latest insights of 8 BR managers, but also to learn how BR can solve the estate planning dilemmas of the UK's growing aged population such as where individuals want to exit assets that are already BR qualifying.

To help you, we're providing Investment Provider and MICAP literature, extended breaks to give you a chance to ask them your burning questions and to network and we've asked the managers to give the crucial nuts and bolts of their offers in their presentations to allow you to make real like for like comparisons on crucial differentiators like returns, fees and underlying investments.

My team and I have lots of information on the other ways we can assist advisers in this area, so thanks for coming and we hope to speak with you while you're here.

Guy Tolhurst

Managing Director, Intelligent Partnership

BRISTOL
1st May 2018
Aztec Hotel & Spa
Bristol, BS32 4TS

EXETER
2nd May 2018
Exeter Racecourse,
Kennford, EX6 7XS

LONDON
8th May 2018
London Stock Exchange,
Paternoster Square, EC4M 7LS

CHESHIRE
9th May 2018
The Mere Golf Resort & Spa
Chester Road, Mere, WA16 6LJ

SOUTHAMPTON
15th May 2018
Hilton at the Ageas Bowl,
Southampton, Botley
Road, West End, SO30 3XH

EDINBURGH
16th May 2018
Radisson Blu Hotel,
Edinburgh, EH1 1TH

MIDLANDS
23rd May 2018
The Belfry Hotel & Resort,
Lichfield Road, Wishaw,
B76 9PR

NORWICH
24th May 2017
Dunston Hall, Ipswich
Road, Norwich, NR14 8PQ

SCHEDULE
OF THE MORNING

London, Cheshire, Southampton, Edinburgh, Midlands, Norwich

08.30 Registration

09.00 Opening Remarks

The event will kick off with the event host setting the scene and letting you know how the morning is going to shape up. We'll also have a live draw to determine the order of the Investment Provider's presentations

09.05 Investment Provider Elevator Pitches

Each Investment Provider will get three minutes to get your attention with a punchy introduction

09.40 Investment Provider Presentations (I)

Getting down to brass tacks - the first four in-depth presentations from the Providers, outlining the unique selling points of their product as well as covering key metrics such as costs, target returns and track record

10.40 Coffee Break

Coffee, tea, biscuits, and networking with the Providers

11.05 Introduction To Part 2 of The Event

Welcome back and picking up on some of the key themes from the first session before launching into session two

11.10 Investment Provider Presentations (II)

The second four in-depth presentations from the Providers

12.10 Q&A

We'll put your questions - including any pre-submitted questions - to all eight of the Providers

12.30 Lunch

Buffet lunch, coffee, tea, and more networking with the Providers

Bristol, Exeter

09.00 Registration

09.30 Opening Remarks

The event will kick off with the event host setting the scene and letting you know how the morning is going to shape up. We'll also have a live draw to determine the order of the Investment Provider's presentations

09.35 Investment Provider Elevator Pitches

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THANK YOU
TO ALL OF OUR ATTENDEES AND PARTICIPATING INVESTMENT PROVIDERS

We hope that the event meets your expectations and helps advisers get to grips with the current market for **BR qualifying investments**

Guy Tolhurst

intelligent partnership*

Guy launched Intelligent Partnership 10 years ago after seeing great opportunities to better serve investment providers, financial advisers and wealth managers across a diverse range of investment strategies and sectors. Intelligent Partnership has naturally evolved into an award-winning and trusted provider of accredited research, events, insights and education on a range of alternative investments.

Guy's commitment to recognising the role and impact of the investment and intermediary communities in supporting small and medium-sized businesses led him to launch the annual *Growth Investor Awards* and *100 Stories of Growth – Capital at Work* campaign, both helping to inspire more UK growth and scale-up success stories.

Guy is an engaged public speaker, SME advocate and industry commentator, helping to raise standards and professionalism across the alternative investment industry. He is an executive director of in:review and a director of MICAP, Intelligent Partnership's sister companies in the Indagate Group.

Dominique Butters

BLACKFINCH INVESTMENTS

Senior Business Development Manager

Dominique Butters joined Blackfinch in October 2016 as Senior Business Development Manager bringing over 27 years' experience in Financial Services bringing her extensive knowledge and experience to the organisation. Dominique's career began in Lloyds Bank in 1989 where she was an adviser for 10 years before moving to Towry Law as an IFA. She then spent 5 years at Clerical Medical specialising in IHT planning and finally 8 years at Octopus Investments. Dominique is well known and highly respected for her technical knowledge and openness in helping advisers work effectively with their professional connections.

Sarah Hendy

BLACKFINCH INVESTMENTS

Business Development Manager

Sarah joined Blackfinch in December 2014 bringing with her over 25 years' experience in the commercial and financial services sectors. Sarah started her career in banking before joining the public relations department at the UK's leading flight simulator company. After a period overseas, Sarah then spent 12 years working in London in the property and media sectors before focusing her career on business and relationship development.

Robert Jones

BLACKFINCH INVESTMENTS

Senior Business Development Manager

Robert joined Blackfinch in 2018 to help grow assets under management by managing relationships with intermediaries and professional advisers in northern areas of the UK. Robert has a wealth of experience having worked in financial services for 34 years, including for Investec, Barclays Wealth and most recently Triple Point. He brings an extensive network of contacts, having been focused on developing strong relationships with advisers in the north of England and Scotland.

Barry Lynas

BLACKFINCH INVESTMENTS

Senior Business Development Manager

Barry Lynas joined Blackfinch as Senior Business Development Manager in August 2016, bringing a real breadth of knowledge and experience. He has worked in financial services for over 30 years and spent the previous eight years with Octopus Investments. Barry lives in Edinburgh and is responsible for building business relationships with advisers and their introducers across Scotland, Northern Ireland, Carlisle & Newcastle Upon Tyne.

Speakers

Jerry R. Price

Chief Distribution Officer

Jerry joined Blackfinch in 2013 to focus on strategic account management and has over 30 years'experience in the financial services industry which has ranged from direct sales, management training and managing an IFA network. Jerry is well known and highly respected for the depth of his knowledge and understanding of the challenges advisers face both at an individual and corporate level.

Gordon Pugh

Senior Business Development Manager

Gordon brings extensive experience working in the tax efficient investment sector. He started his career in the Enterprise Investment Scheme team at Close Brothers Investment where he was involved with a number of technology, pub and film EIS companies as well as VCTs and inheritance tax mitigating trading companies. He then joined Octopus distributing VCTs, IHT portfolios and EIS products. Subsequently, he helped to start up Stellar Asset Management and was involved with forestry, hotel, farming, EIS funds and their trading companies for IHT. He has also been involved with investment within the media sector since 2002, including numerous films for UK television. Gordon has the IMC and completed the first stage of the CFA.

Sarah Wakefield

Business Development Manager

Sarah joined Blackfinch in 2018 to help grow assets under management through managing relationships with intermediaries and professional advisers in south-west England. She brings over 20 years' experience in financial services and an extensive knowledge of Inheritance Tax (IHT) solutions. Sarah's previous roles include Zurich Financial Services, St. James's Place and Canada Life, throughout which she has specialised in IHT solutions and building trusted relationships with financial advisers in the South West.

Andrew Aldridge

Partner & Head of Marketing

Andrew oversees all Deepbridge communications and messaging. Andrew has a wealth of experience marketing financial and professional institutions, with over a decade of experience building credible brands and delivering real growth.

Andrew is a Member of The Chartered Institute of Marketing and holds a BSc in Business Economics and Marketing from the University of Wales, Aberystwyth. Andrew is also a trustee of the Tim Parry Johnathan Ball Peace Foundation.

Louise Farley

Partner & Head of Business Development

Louise oversees the Business Development team, ensuring advisers receive a first class relationship with Deepbridge. Louise also develops and manages relationships with financial advisers across London and the South East of England. Louise has 15 years' experience in the finance and investment sectors. As well as running her own financial intermediary business, Louise has also held senior roles in-house for top private equity companies, including Foresight Group and Electra Partners where she was responsible for promoting VCT, EIS and BPR propositions. Louise holds a BA (Hons) in Business Management.

Bill Bousfield

Sales Director

Bill joined Downing in 2008 having previously worked for several large insurance companies dealing with wealth advisory firms in London and the South-East. He enjoys working with companies to help build relationships and expand the service IFAs can offer to their clients. He is based from our London head office, and develops business in London, Surrey, Hampshire and Berkshire, as well as working with the Nationals and Networks.

Laurence Callcut

Partner and Head of Sales

Laurence is a Partner and Head of Sales at Downing where he has been since 2004. His financial services career spans over 30 years working previously with major insurers in management, marketing and sales roles. Laurence is a Chartered Insurer, and Member of the Securities & Investment Institute.

Andy Howe

Sales Director

Andy has been in the financial services industry since 1989 and prior to joining Downing in 2009 spent 15 years with M&G. Andy has developed strong relationships with advisers in the East Anglia & East Midlands regions and is keen to help advisers add value to their client and professional connections.

Jeff Lee

Business Development Manager

Jeff joined Downing in March 2017 as Business Development Manager focusing on the North West region. He has worked in the financial services sector for over 30 years, most recently as Head of Investment Sales at Canada Life. Prior to that, Jeff spent 20 years at Scottish Widows, where amongst other roles, he opened and ran the offices of Scottish Widows International in Dubai. Jeff is a qualified Chartered Financial Planner and holds the Investment Management Certificate.

Tony Sime

Sales Director

Tony joined Downing in 2015, bringing a real breadth of knowledge and experience. He has worked in financial services for 24 years. Most of this time has been spent as an Adviser, recommending EIS, VCT and BPR products, a Sales Manager and in a strategic investment role for banks and wealth managers, with a focus on high net worth individuals and business clients. Tony provides help with case involvement, and structured CPD with professional connections. Prior to joining Downing, Tony worked for Octopus, National Australia Bank, Clydesdale Bank and Principal & Prosper Holdings.

Mike Currie

Partner & Head of Retail Sales

Mike joined Foresight Group in 2006 after six years as principal Sales Manager for two alternative investment based tax-efficient product providers. At Foresight Mike leads the Retail Sales team and since his arrival the Group has broadened its focus to become a leading independent Infrastructure and Private Equity investment manager while Assets Under Management have grown from £90 million to £2.8 billion. Mike was made Partner in 2012.Mike is responsible for leading the marketing and sale of Foresight's family of VCTs, EISs, Inheritance Tax Solutions, Foresight Smart Bonds Fund and Foresight Infrastructure Income Fund.

Nick Morgan

Partner, Sales and Marketing

Nick joined Foresight in 2012 and is responsible for the development and distribution of Foresight's retail products. Previously Nick spent five years at Octopus Investments. Prior to Octopus Nick was a sales consultant with Trailfinders Ltd following a period of extensive travel in the Far East, Africa and Americas. Nick holds a BSc in Economics and Economic History from Bristol University.

Speakers

Gabby Beaumont

INGENIOUS

Senior Investment Director and heads up the Strategic Relationships Team

Gabby is responsible for establishing and cultivating long term, multi-layered relationships with large national accounts, financial adviser networks, private banks, service providers, solicitors and accountants. Prior to joining Ingenious in 2009, Gabrielle qualified as a Chartered Accountant and Chartered Tax Adviser with Deloitte, where she worked for over six years in their Real Estate Tax group in London, specialising in the taxation of real estate transactions and international property holding structures.

Gabrielle has a BSc (Hons) degree in Geography from the University of Birmingham, and is a member of the Institute of Chartered Accountants in England and Wales and the Chartered Institute of Taxation.

Matt Dickens

INGENIOUS

Investment Director in the Client Relationship Team

Matt is responsible for developing relationships with investors and their advisers. Having graduated from the Royal Military Academy Sandhurst, Matt served as an Army officer for 8 years, primarily in the Royal Horse Artillery. On leaving the Army he became a consultant, and then manager, in the Financial Services Division of KPMG, with a focus on Investment Banking and Asset Management. Subsequently, he has worked as a private client adviser at both a US Fund Manager and then Close Brothers Asset Management, before joining Ingenious. Matt holds the Level 6 Private Client Investment Advice & Management qualification, and is both a Chartered Wealth Manager and Member of the Securities and Investments Institute (CISI).

Simon Harryman

INGENIOUS

Investment Director in the Client Relationship Team

Simon is responsible for developing relationships with investors and their advisers. Commencing his career in retail banking, Simon has amassed a wealth of experience during his 30 years in the financial services sector. Whilst he has worked with a number of the UK's most pre-eminent financial institutions, in a variety of client facing and leadership roles, Simon has also successfully grown his own wealth management and product distribution businesses. With a deep understanding of the advice process, the commercial realities of managing a regulated financial services business, and a passion for thought leadership, he enjoys a great affinity with the professional advice community. Simon, alongside his team, now utilises his skills and knowledge by developing excellent relationships with Advisers and helping them to deliver great solutions for their clients. Committed to professional development, Simon holds the CISI Level 6 Private Client Investment Advice and Management qualification.

Anne Slater-Brooks

INGENIOUS

Investment Director in the Client Relationship Team

Anne is responsible for developing multi-layered relationships with large national accounts, financial adviser networks, service providers, solicitors and accountants. Prior to joining Ingenious in 2017, Anne spent a number of years at Canada Life in a variety of sales roles, including Head of National Accounts and Head of Sales Development. After a brief stint at Downing, she joined Ingenious to help develop relationships with key strategic partners. She has over twenty years' experience in the industry with a strong emphasis on tax and trusts, and is passionate about helping advisers grow their businesses and build relationships with professional introducers. Anne holds a BA in French and Politics from the University of Loughborough, is a full member of STEP, a Fellow of the CII, and recently completed her MBA with Distinction from the University of Bradford.

Camilla Wilkes

INGENIOUS

Investment Director in the Client Relationship Team

Camilla is responsible for developing relationships with investors and their advisers. Prior to joining Ingenious in 2011, Camilla worked as a Product Specialist at Barclays Wealth & Investment Management. Camilla also spent a number of years as a Business Development Manager at the ECU Group Plc, a discretionary fund manager. Camilla has a MEng (Hons) degree in Metallurgy and the Science of Materials from the University of Oxford. Camilla is a Member of the Chartered Institute for Securities & Investment and holds a number of Financial Services qualifications, and has completed level one of the CFA program. She is also a Member of the Association of Taxation Technicians having successfully completed examinations in IHT, Trusts & Estates, Personal Taxation, Business Taxation & Accounting Principles, Professional Responsibilities & Ethics and Law for Tax Practitioners.

Tom Attwooll

OXFORD CAPITAL

Senior Manager, Wealth Managers & Advisers

Tom has responsibility for a number of Oxford Capital's key national account relationships as well as being the regional account manager for the South East, North West, North Wales, East Anglia and West Midlands. Prior to joining Oxford Capital in 2013, Tom worked in the UK with Deloitte and in Latin America with De Vere Group, where he developed an extensive knowledge of sophisticated financial planning and client service.Tom has a BA (hons) in Economics from the University of Liverpool and a diploma in Investment Advice. Outside of the office he is a keen chef and cricketer.

James Faulkner

OXFORD CAPITAL

Senior Manager, Wealth Managers & Advisers

James looks after a number of Oxford Capital's key relationships with national accounts as well as being the regional account manager for the South West, South Wales, North East and East Midlands. He joined Oxford Capital late 2011, bringing with him over 20 years of business development and relationship management experience, most recently with PWC. James is a Chartered Member of the CISI and has diplomas in Business Administration & Management and Investment Advice. In his spare time, when he's not walking the family dog, James enjoys keeping fit and regularly competes in triathlons.

Rob Bickerstaffe

PUMA INVESTMENTS

Senior Business Development Manager

Rob joined Puma Investments in 2016 as Senior Business Development Manager for the North of England and is based in Manchester. Most recently, Rob was an Investment Manager in the Client Relationship Team at Ingenious Investments with responsibility for all EIS and BPR Sales & Marketing activity across the North West. Rob has over 20 years' financial services experience, having worked at Coutts & Co and Barclays Wealth as a Private Banker and Wealth Manager. He is a Member of the Chartered Institute for Securities & Investment and holds a variety of Investment & Financial Planning qualifications from both the CISI & CII.

Andrew Derrington

PUMA INVESTMENTS

Senior Business Development Manager

Andrew joined Puma Investments in 2016 and is permanently based in Scotland. Previously he was Business Development Manager for the West of Scotland at Octopus Investments. Prior to that Andrew worked for Ingenious Investments and Future Capital Partners, distributing products into the UK Intermediary Market. Andrew is a qualified chartered accountant.

Justin Elmes

PUMA INVESTMENTS

Senior Business Development Manager

Justin joined Puma Investments in 2016 as a Senior Business Development Manager. Justin was responsible for all sales and marketing activity in the South West for Ingenious Investments' EIS and Business Relief products. He also spent a number of years at Octopus Investments and prior to that the ECU Group Plc, where he was responsible for establishing and developing relationships with financial advisers and their clients.

Hugh Rogers

PUMA INVESTMENTS

Business Development Director

Hugh joined Shore Capital in 2009 to raise the profile of their tax efficient offerings to the UK Independent Financial Adviser network, and heads up the team overseeing business development and investor relations for Puma Investments. Previously he was at Bestinvest (now TilneyBestinvest) in 1999 for over 9 years and held roles as investment manager, team leader and was responsible for advising clients on their VCT investments. Hugh graduated from St Andrews University with a degree in Psychology & Economics.

Henny Dovland

TIME INVESTMENTS

Senior Business Development Manager

Henny Dovland joined TIME Investments in January 2014, having previously been at Octopus Investments for five and half years. She has been working in the tax efficient investment space for nearly seven years and has a particular focus on legislation based tax planning incorporating Enterprise Investment Schemes and Inheritance Tax Planning through the use of Business Relief qualifying investments. Henny has during the last seven years worked exclusively with financial advisers, wealth managers and private banks to allow planners to add value to their client bank and their professional connections.

Elizabeth Greene
TIME INVESTMENTS

Business Development Manager

Elizabeth is part of the team responsible for developing relationships with advisers and their introducers across the Midlands and Central Wales. Prior to joining TIME, Elizabeth spent seven years at Ingenious as a Senior Investment Manager. Before that she specialised in fund structuring, working for a media company on the launch and management of a debt fund. She has been a Commercial Manager for a finance company involved with all aspects of fund structuring, fund raising and investor relations. She holds a BA (Hons) degree in History and English from Durham University. Outside of work, Elizabeth is a political campaigner for Brain Tumour Research. She is a fan of most sports as well as her local village pub. Most weekends she can be found in the countryside with her cocker spaniel.

Chris Horsford
TIME INVESTMENTS

Business Development Manager

Chris joined TIME for the South West in January 2014, having previously been at Iveagh Limited – the Family Office for the Guinness brewing dynasty managing the investments of the descendants of Arthur Guinness, the inventor of the perfect pint. The early part of Chris's career was spent as a commissioned officer in the Armed Forces, where he served as a Captain in The Light Infantry on operations all over the world, included Bosnia, Kosovo, Sierra Leone and Iraq. Chris lives in Honiton, Devon and outside of work finds most of his time taken up by his two young boys. Chris retains a passion for the ocean, being an experienced surfer, scuba diver and sailor and hopes to one day add to his two transatlantic sailing voyages.

Simon Housden
TIME INVESTMENTS

Sales and Marketing Director

Simon joined TIME in October 2012, having previously been at Octopus Investments for almost seven years, where he held roles from Senior Business Development Manager to Head of Strategic Partnerships. At TIME Simon heads up a team of nine field based Business Development Managers, providing nationwide coverage, and an office based team of ten located in TIME's head office in Central London. Simon is also one of the four partners at TIME, helping to determine the business'overall strategy and direction. Simon has over 20 years' experience in financial services, having worked for a life company for 14 years, latterly as a Regional Sales Manager. Simon graduated from Portsmouth University with a BSc Degree in Computer Science.Outside of work, Simon enjoys the diverse hobbies of gliding and dancing. He is a qualified gliding instructor and has represented the UK by competing at an international level. He claims that partner dancing helps keep him fit and regularly competes in both Modern Jive and West Coast Swing.

Dave Hughes
TIME INVESTMENTS

Senior Business Development Manager

Dave joined TIME in March 2014 and is responsible for the team that covers the South and West side of the UK. Dave is also directly responsible for supporting advisers in the South West and South Wales area.Dave has spent his entire career in financial services and over the years has held senior positions at Octopus Investments, Prudential , NPI and Just Retirement. Prior to this Dave also spent time working as a financial adviser.

Sam Jermy
TIME INVESTMENTS

Business Development Manager

Sam joined TIME in September 2014 covering the South East of England. Prior to joining TIME, Sam worked as a financial planner, providing wealth management and tax planning advice to clients of Sussex based law firms.Sam was awarded Chartered Financial Planner status in 2014 and also holds STEP and IMC accreditations. After graduating from the University of East Anglia with a first class degree in Economic Development, Sam has accumulated 18 years of experience working within investment and wealth management companies. His work has included the management of advisory business relationships in the UK, and further afield in the Far East and Middle East.Sam lives on the coast in Brighton and enjoys an outdoor life with his family. He is actively involved with his son's football team and can often be spotted running on the South Downs or bobbing up and down on a surf board in the English Channel.

Bob Nicoll
TIME INVESTMENTS

Business Development Manager

Bob joined TIME in September 2014, having previously spent 12 years at Aviva. Bob is originally from Glasgow however on joining Aviva's graduate programme he spent time in London and Cheltenham before settling in Manchester. At Aviva, Bob looked after a panel of key accounts, primarily in the Manchester area. At TIME Bob works closely with Kate providing support to advisers across the North West. Bob holds a BA Hons in Business Studies and Economics from the University of Stirling and has since achieved FPFS status and most recently the IMC qualification.

Speakers

Campbell Rayner
TIME INVESTMENTS

Business Development Manager

Campbell joined TIME in June 2017 and is responsible for working closely and developing new business opportunities in conjunction with advisers and their professional connections across Scotland and Northern Ireland. Campbell has over 25 years' experience of working with advisers and wealth managers and has held senior positions (both at national and regional levels) with NPI, Legal & General and Barclays Investment Solutions. He has a great deal of experience of working with advisers in key business areas such as WRAP platforms, investments, pensions and tax solutions. Outside the office Campbell spends much of his time as an unpaid taxi driver to his two children, anything left is spent playing football, tennis, music and walking the dog.

Marc Bell
TriplePoint

Business Development Manager

Marc joined Triple Point in July 2017 to develop new and existing relationships with intermediaries across the South West and the Midlands. He enjoys helping advisers add value to their proposition with the innovative product range Triple Point has available. Prior to joining Triple Point, Marc spent two years advising expatriates in Singapore, in which he focused on all aspects of financial planning. He graduated from Nottingham Trent University in 2011 with a degree in Business, and has since obtained the Diploma in Regulated Financial Planning.

Venetia Coleman
TriplePoint

Sales and Investor Relations Team

Venetia joined Triple Point in 2008 and is responsible for the promotion and marketing of all Triple Point's products to the regulated adviser sector. With 10 years of experience in the tax efficient market, she has a deep understanding of the products and services offered and how they may add value to client's estates. Venetia graduated in engineering from Northumbria University, whichallows her to really bring to life the infrastructure and technology based investments Triple Point offer.

Graham Robertson
TriplePoint

Sales and Investor Relations Team

Graham joined Triple Point in 2007 and manages relationships across the intermediary market and is used to working with advisors ranging from small regional to large national businesses. He has over 30 years' experience in sales and marketing roles with leading London based asset management businesses across a wide range of sophisticated product types. He is a member of the Chartered Institute for Securities and Investment, the Personal Finance Society and the Chartered Insurance Institute.

Dan South
TriplePoint

Sales and Investor Relations Team

Dan joined Triple Point in November 2014 to develop relationships with key influences in the intermediary market. He has been working with professional advisers in the financial service arena for over 10 years, much of this experience spent working in intermediary sales in either business development or sales management. He previously worked for The Hartford Financial Group, Barclays Wealth and Partnership Assurance, where he was responsible for distributing their range of investments to Wealth Managers and Financial Advisers throughout the UK. Dan has a BSc from Brunel University, The Investment Management Certificate (IMC level 4), Investment Advise Diploma (IAD) and is also qualified in Equity Release and Long Term Care.

Belinda Thomas
TriplePoint

Sales and Investor Relations Team Manager

Belinda is a Triple Point Partner and leads the sales and investor relations team. She joined Triple Point in 2009 and has been instrumental in taking multiple products to market as well as building and managing Triple Point's extensive distribution network. She has worked within the sector for 17 years. Belinda graduated from the University of Newcastle and qualified as an Accountant at PwC. She is a chartered wealth manager and a chartered fellow of the CISI. Belinda joined Triple Point after eight years at Schroders Private Bank, where she was a Client Director.

BLACKFINCH INVESTMENTS

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CONSIDERATIONS

QUESTIONS

NEXT STEPS

Deepbridge

CONTENT /5 PRESENTATION /5

HIGHLIGHTS

CONSIDERATIONS

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Downing

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THANK YOU

FOR ATTENDING THIS BR SHOWCASE

Here at **Intelligent Partnership** we organise these types of events for advisers:

Masterclasses

Taking place throughout the UK, our Masterclass events are designed to give advisers in-depth technical knowledge on alternative investments. With insights from high quality speakers encompassing investment providers, compliance experts, advisers and practitioners, they are CPD accredited and the content is carefully curated to ensure there are no sales pitches.

Showcases

Our Showcase events give advisers the opportunity to hear alternative investment providers present their investment opportunities on a like for like basis. Unlike other events, we ensure that the content of the presentations covers all of the key issues that exercise advisers, so the presenters cannot just play to their strengths.

Roundtables

By participating in our Roundtable discussions advisers can learn more about how their peers are using alternative investments, voice their opinions on the industry and help influence investment providers' product development. Our Roundtables are a unique forum for discussion of topics that get little coverage elsewhere.

Alternative Investment Summit

Aimed at advisory firm principals, key decision-makers and industry professionals, the Summit covers the entire alternative investment universe. Leading industry figures discuss the key topics that are affecting advisers, planners, compliance functions, regulators and investment providers.

You’re on the road to mastery...

Engage with our entire programme of reports, education, events and weekly e-mails to keep up to date and feel confident about the whole investment universe.

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Intelligent Partnership

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Company Registration No. 06442114
Company registered in England and Wales